

March 2017

#### Administrative Services Bureau/Fiscal Policy Review

There has been an internal ASB Fiscal work group that has continued to meet on a regular basis in efforts to develop fiscal financial services manual. Communication has recently occurred in March, 2017 to provide staff with guidance on how to create standard operating procedures in the template we've created and what will happen to those documents as a part of the ASB Policy and Procedure manual. Once the documents are approved, the expectation is that these will become the internal processing policy.

A priority for the agency remains the full completion of the ASB Policy and Procedures manual by September 30, 2017. Due to the size of this project, we are providing guidance to help everyone manage the large volume of documents that will be compiled for the manual.

#### Action steps needed:

1. Effective immediately, all procedures must be saved in the ASB Policy and Procedures (ASBP&P) folder at this path: \\VRDSMFS2\DSM\_vrdsmfs1\ASB Policy and Procedure Manual\2.DRAFT INSTRUCTIONS
  - a. If you know the category, please locate your document in folder categories 1 – 11, or simply place in the “All Draft Documents Uncategorized” folder.
2. Only one version can exist of each procedure you document and all revisions should be made to that document.
3. When a procedure draft is completed and ready for Jan to review, do not send to her as an attachment. Please send an email to Jan, and within the email, note the file name and file location where it can be found within the ASBP&P folder.

“No one can whistle a symphony. It takes a whole orchestra to play it.”

This is a challenging project – we thank everyone for the team effort!

The template will involve several steps that will seek out guidance and involvement from many. This will help narrow the tasks identified in a manner that can be captured for the completion of the Manual. The above steps identify the process the work group is taking to communicate to fiscal staff their roles and responsibilities. This is a large undertaking, but we continue to make progress in the development of the Manual.

The CORE Group has changed to integrate into Strategic Plan Initiatives. In the February, 2017 meeting it was outlined to change the direction of CORE to further support planning efforts in compliance with the 2017 RSA Technical Assistance Monitoring Guide. CORE will continue with our agenda of reporting on contract issues, but the focus will really be on either positive success stories that the Committee will want to share in or on specific issues that need problem solving by the Committee members. Additionally, new attention will change to work groups that are tasked with working through the Monitoring and TA Guide.

The first task is for all members to review pages 1-12 of the Guide to obtain a basic understanding of the purpose. The Program Team and fiscal team will then be given work assignments for specific sections and be asked to respond to the questions.

The RSB Bureau will also be reviewing sections with the area office supervisors and will draft a SWOT report by November 2017 following their annual office supervisor retreat.

This work will help CORE review our status, increase our active involvement as an agency in reviewing and monitoring strategic objectives and how data performance results impact decisions. It will help ensure we are integrating discussion and perspectives from staff at different viewpoints to help make sure we move forward as an agency. The CORE Work Groups will do the heavy lifting on addressing these policy and procedure questions and play a critical role in providing feedback on fiscal/financial oversight and impact on service delivery strategies. Jeff Haight will play a key role in helping provide data consistent with what we can obtain through Appendix C and will make that available to CORE as it is completed. This data will be shared through the CORE shared folder. Focus for Jeff will be on the Iowa data, we may have limited access to current national averages and numbers. Kelley Rice will be the task master and be involved in helping facilitate progress from both groups to ensure task completion and timely progress. She will also be reviewing the TA Monitoring Guide and help oversee our internal monitoring and compliance process.

The results of the CORE group will occur over time as we chip away at the Guide. This work will influence strategic planning, the comprehensive state wide needs assessment, follow-through on our state unified plan and service strategies impacting employment outcomes and fiscal compliance.